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PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL
COMMITTEE AND THE COMMITTEE OF THE REGIONS**

Towards a comprehensive European Ports Strategy

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1. INTRODUCTION

For millennia, ports have been the main locations for people, goods and ideas to meet and pass through, building today's port cities, enabling regional and global trade, and thus the world as we know it today. They are **lifelines for islands and coastal regions, and hosts for industry and innovation clusters and play a crucial role when it comes to energy supply, the blue economy and Europe's strategic autonomy.**

In today's geopolitical situation, **EU ports are increasingly on the frontline.** They are evolving beyond their traditional role to become strategic hubs for energy distribution, enabling the green transition and for critical infrastructure for defence readiness. Ports thus are pillars of the Union's economic and societal resilience. This transformation brings major opportunities, but also new vulnerabilities and responsibilities - from fighting criminal networks, cyber and drone threats to concerns around foreign ownership and intensifying competition from third countries.

EU ports handle more than 3.4 billion tonnes or 74% of goods entering or leaving Europe and around 395 million passengers each year. With almost 3 million port calls, the EU accounts for 23% of the port calls worldwide.¹ Their economic footprint reached a turnover of around EUR 90 billion in 2022 and around 423 000 direct jobs². Connecting this ecosystem, the trans-European transport network links 283 seaports, 223 inland ports and 44 mixed ports. Small and medium ports are the majority and often provide important services in niche markets.

The wide-ranging consultation process³ with industry, Member States and other stakeholders has shown that there is a clear need to strengthen the competitiveness of EU ports, empower ports for the energy transition, support them in decarbonisation, make ports secure and resilient, ensure the needed financing and strengthen the social role of ports. The diversity of ports, in terms of size, location, market segments served, governance models, and stakeholders involved, calls for a broad, and flexible approach across the EU.

The moment to act is now. The EU Ports Strategy brings together ongoing and new initiatives, simplification and guidance for implementing existing legislations, and for achieving policy goals more coherently across relevant sectors, by involving Member States and all relevant port stakeholders⁴.

¹ Figures 2022, Port activities - The EU Blue economy report 2025 - Maritime Affairs and Fisheries (DG-MARE)

² <https://op.europa.eu/en/publication-detail/-/publication/0a4a79d8-353f-11f0-8a44-01aa75ed71a1>

³ Strategic dialogue https://transport.ec.europa.eu/news-events/news/commission-sets-course-future-eu-ports-and-maritime-industry-2025-07-01_en, Call for Evidence https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14659-EU-Ports-Strategy_en, Meeting of the European Ports Forum https://ec.europa.eu/transparency/expert-groups-register/screen/expert-groups/consult?lang=en&do=groupDetail_groupDetail&groupID=3542

⁴ The EU Ports Strategy is focused on transport aspects and is addressed both to maritime and inland ports of the TEN-T Network. Issues relating to ports equipment are covered under the EU Maritime Industrial Strategy, while aspects relating to other Blue Economy sectors, including tourism, marinas, etc are covered under the European Ocean Pact https://oceans-and-fisheries.ec.europa.eu/european-ocean-pact_en, the European Strategy for the Outermost Regions https://ec.europa.eu/regional_policy/policy/themes/outermost-regions/strategy_en. the [Strategy on islands and coastal communities XXXX] and the EU Sustainable Tourism Strategy <https://transition-pathways.europa.eu/tourism/news/help-shape-eus-2026-sustainable-tourism-strategy>

EU Ports Strategy

**STRENGTHEN COMPETITIVENESS,
INNOVATION & DIGITALISATION**

**ADVANCE NEW ENERGIES,
SUSTAINABILITY &
REINDUSTRIALISATION**

PROTECT & SECURE PORTS

**ACCESS TO FINANCE &
INVESTMENT**

**SOCIAL COHESION, SKILLS &
QUALITY JOBS**

2. STRENGTHEN COMPETITIVENESS, INNOVATION & DIGITALISATION

2.1. *A well-functioning internal market and fair competition*

A well-functioning internal market is crucial for the competitive strength of EU ports. It improves their global competitiveness, supports Europe's strategic autonomy, and safeguards employment in the port sector. That's why already the 2013 EU Ports Policy⁵ focussed on facilitating trade and the internal market. While progress has been made⁶ challenges remain, for example relating to inconsistent implementation of competition rules across Member States, potential negative impacts of concentration in the market, and slow permitting processes.

Increasing vertical integration of large logistics and shipping operators⁷ is changing the traditional port landscape. It can lead to input foreclosure, where a port may disadvantage competing shipping lines, and customer foreclosure, where a shipping company might bypass competitors' ports. **In the upcoming revision of the merger guidelines, the Commission will address both horizontal and non-horizontal effects of mergers** and analyse whether they have an impact on competition in the internal market.

EU State aid rules frame funding by Member States to ports and are an important tool to support investments in policy priority areas. Several stakeholders have expressed the need for a clearer and simpler State aid framework. To enable Member States to provide needed support to ports, the revised rules on ports and maritime links in the Decision on Services of General Economic Interest (SGEI) allow Member States to support more efficiently smaller ports, and particularly those in islands and outermost region⁸. In addition, as ports have to address emerging challenges (security, cybersecurity, digitalisation, military mobility and reskilling of port workers for new technologies), it is important to ensure that is done in fair competition. **The Commission will include additional objectives** to reflect this new operational reality and **increase thresholds** for prior notification to the Commission **in the ongoing review of Commission Regulation (EU) No 651/2014 ("General Block Exemption Regulation")**. **A forthcoming update of the analytical grid for State aid related to ports will clarify priorities and conditions under which public support for investments in ports will be compatible with EU law.**

In the EU, with the widespread landlord port governance model, port authorities award port concession or land lease contracts to port terminal operators. While their duration reflects the need to amortise large investments, very long contract and land lease durations with renewal options limit potential new market entries, promote market concentration, and could impact the ability for ports to adequately respond to urgent societal needs, or to implement new policy directions.

⁵ Communication from the Commission: 'Ports: an engine for growth' (COM(2013)0295)

⁶ According to the conclusions of the report to the European Parliament and the Council on the functioning and effect of the EU Port Services Regulation [to be published with the strategy]

⁷ In the ports' context this means for instance large shipping companies increasingly investing in port terminals and expanding into other logistics activities such as land transportation or tug operations.

⁸ Decision on Services of General Economic Interest (SGEI) (Commission Decision (EU) of 16 December 2025 (C/2025/8820 final).

To address such market and efficiency obstacles, the Commission will, through the upcoming revision of the public procurement Directives, **modernise the concession framework** by assessing how to simplify and allow for more flexibility during the award and implementation phases. This includes better uptake of EU funded innovations, alignment with EU policy objectives and economic security considerations. The Commission **will clarify the scope and provisions of the Concessions Directive as regards the coverage of port concessions**. In addition, as **land-lease agreements** are a widely used tool, **the Commission will develop guidance for best practices** to promote their efficient application across the EU and encourages Member States and industry to apply it consistently.

Member States and sector stakeholders should ensure appropriate duration, transparent and fair renewal conditions and use of flexibility clauses (in response to security, environmental needs), promoting “made in EU” innovative solutions, and accelerating achievement of EU policy objectives, when issuing or renewing port concessions and land lease contracts.

2.2. Maintain global competitiveness

As trade by sea is global, EU ports both cooperate and compete with ports from around the world, making relations with these ports complex and multifaceted, involving several actors and areas. Competitiveness in ports is affected by costs (including energy, labour, state supported investments and subsidies) and non-cost factors (especially applicable standards and laws). Increasing disparities have been pointed out by most stakeholders for the container shipping segment, transshipments and bunkering services especially for third country ports close to the EU. Uneven legal frameworks (for environmental, social and other aspects), and aggressive investment strategies are voiced as major concerns for a level-playing field.

The Commission will prioritise mutually beneficial projects in third country ports in line with these clear guiding principles.

Guiding principles for EU support to third country ports

EU support to ports in third countries should be based on principles and criteria:

- *Focus on mutually beneficial partnerships, supporting common priorities, such as improving technical compatibility and interoperability, implementing common standards, expanding clean fuel infrastructure, improving environment, biodiversity and climate protection, enhancing passenger and cruise connections, capacity building for safety and security, and combating drug and human trafficking.*
- *Fair competition, adherence to adequate human rights, social and environmental standards as well as safety and security requirements.*
- *Safeguarding EU competitiveness (including a competitiveness check to avoid financial support to port projects that impact activities in nearby EU ports within 300 nautical miles⁹).*
- *Support EU private sector strategic investments to enhance their connectivity with third country ports in view of strengthening port/maritime governance, trade, import/export of critical raw materials (CRM) or renewable fuels, etc.*
- *Ensure that international agreements between the EU and third countries contain fair market access conditions for port and terminal services and to concessions for the provision of those services, with clear mechanisms to follow their application.*
- *Support to adherence to ambitious binding international agreements in IMO*
- *EEAS and EU Delegations will support the application of this doctrine.*

⁹ In line with EU Maritime ETS

Member States, EU financial institutions and stakeholders should apply the guiding principles set out in this strategy also to their own initiatives and enhance general coordination and information exchange. In addition, Member States and their standardisation bodies should be at the forefront of setting technical standards in relevant international fora (such as ISO).

[Placeholder IMO and level playing field]. In parallel, this strategy sets EU funding priorities both for EU (see section 5) and third country port projects (see guiding principles above), with further measures targeting the shipping sector envisaged in the European Maritime Industrial Strategy.

EU ports and energy companies engage with **third country ports** in the development of infrastructure for clean energies and fuels. EU ports and shipping companies invest abroad in global logistics chains. This is supported by the Commission through the Global Gateway strategy¹⁰.

Access to third country port markets should be based on fair conditions, however, uneven playing fields are created if EU operators are restricted from investing or operating in a third country, while those third country operators enjoy unrestricted access to the EU market. In this respect the **Commission will apply the guiding principles of this strategy as regards international agreements. The Commission will support EU businesses to obtain fair investment conditions and market access in port infrastructures and operations abroad**, via the EEAS and EU Delegations. EU support for third country port projects needs to be compatible with a global level playing field, including requirements on environment, biodiversity and climate protection, working conditions, safety and security, transparent and open market and funding conditions. In addition, **Member States should ensure that bidders from markets that exclude EU operators do not benefit from unqualified access to EU port-related concessions and procurement opportunities.**

Initiatives such as the Global Gateway Green Shipping Corridors (GGGSC)¹¹ and the Pact for the Mediterranean¹² or the recently signed "Future-Ready Shipping in Africa"¹³ project will strengthen cooperation with third countries and multilateral organisations and financial institutions, while preserving the competitiveness of EU ports. As Arctic routes open for new shipping connections, the EU must defend strategic interests on EU security, trade, energy, and global navigation, where EU ports will play a critical role, in conjunction with the actions of the European Industrial Maritime Strategy.

The Commission will keep monitoring market developments in the port sector both within and outside the EU, to improve awareness and inform potential future actions as appropriate.

2.3. Attract foreign direct investment while ensuring strategic autonomy of EU ports

As world leaders in maritime transport and logistics chains, European ports attract strategic investors. The Commission is addressing foreign influence and security through several horizontal instruments¹⁴. The EU Foreign Subsidies Regulation¹⁵ ensures that companies receiving foreign state support and involved in port operations, investments, or public procurement, do not gain unfair competitive advantages within the internal market. The revised FDI Screening Regulation¹⁶ will require Member States to screen foreign direct investments in TEN-T core network ports. In addition, the Commission

¹⁰ The Clean Energy Ministerial also supports ports, for example under its Hydrogen Global Ports Coalition, (<https://www.cleanenergyministerial.org/initiatives-campaigns/hydrogen-initiative/>)

¹¹ https://international-partnerships.ec.europa.eu/policies/global-gateway/global-maritime-green-corridor_cn

¹² https://north-africa-middle-east-gulf.ec.europa.eu/what-we-do/pact-mediterranean_cn

¹³ <https://www.imo.org/en/mediacentre/pages/whatsnew-2388.aspx>

¹⁴ Including the Foreign Direct Investment Screening Regulation, the Foreign Subsidies Regulation, the Critical Entities Resilience Directive, and the NIS2 Directive, which also covers cybersecurity aspects.

¹⁵ REGULATION (EU) 2022/2560 , (OJ L 330, 23.12.2022)

¹⁶ Reference to add once published

intends to use the upcoming review of the Cybersecurity Act to enact at EU level restrictions on access of high-risk suppliers to critical infrastructure.

To ensure harmonised implementation, the Commission **will develop guidance to Member States for the ports sector, with criteria for assessing foreign investments**. This will include systematic classification and risk assessment of ports, port terminals, port service providers, operators, workers and energy companies in ports on their role in critical supply chains or military mobility. Furthermore, a **framework for mapping and monitoring of foreign investments in EU ports** will be established.

The new Strategic Approach to Strengthening EU Economic Security¹⁷ calls for more assertive EU action and to anticipate, deter and mitigate risks and reduce strategic dependencies. This includes limiting ownership, control and operation by high-risk suppliers, preventing access by high-risk entities to EU-supported action, and developing trusted suppliers of critical sub-components.

Dependence on external ownership and foreign control of critical equipment and infrastructure can expose operational and strategic risks for ports in exceptional circumstances. In line with the **proposal for a Military Mobility Regulation**¹⁸, Member States should **put in place stricter rules on the ownership and control of strategic dual-use infrastructures and its related operations and equipment as well as mitigate and address already existing risks of foreign ownership of control in addition to the FDI Screening Regulation**. In this context, ports should undergo a thorough assessment by the Member State to mitigate risks of foreign ownership, operational control and equipment from high-risk suppliers. Furthermore, Member States are to establish frameworks to ensure timely access to critical transport resources, including ports, when alternative measures, such as contracting, cannot be mobilized within the required timeframe. Ultimately, **Member States should ensure the possibility of gaining temporary public control or right of use of strategic dual use infrastructure, assets or equipment under national law. The Commission calls on the co-legislators to adopt the Military Mobility Regulation as soon as possible and on Member States to ensure that the necessary measures are fully implemented.**

2.4. Increase the benefits of innovation in EU ports

Innovation has been a key driver in improving efficiency and competitiveness in the port sector. Challenges in terms of sustainability, energy efficiency, safety and security, as well as the wider use of advanced technology like artificial intelligence, open new opportunities for innovative European solutions in EU ports.

Despite longstanding R&I funding, a persistent “valley of death” gap remains, with many innovative solutions not reaching larger market deployment, especially in small and medium ports. To ensure deployment beyond the pilot phase, **the Commission will place stronger emphasis on this goal in future Horizon Europe initiatives**¹⁹, bringing together stakeholders and port authorities.

The Commission will continue to promote R&I to enable the digital and clean transitions in the waterborne transport sector, with increased focus on enhancing the competitiveness, sustainability, resilience and security of EU ports and supply chains. The funding priorities and conditions included in section 5 will aim to **focus research to priority areas and prioritise the results of EU research in implementation projects, thus supporting deployment and addressing the “valley of death” gap.**

¹⁷ Joint Communication on Strengthening EU Economic Security” (JOIN (2025)977).

¹⁸ [Proposal for a Regulation on establishing a framework of measures to facilitate the transport of military equipment, goods and personnel across the Union](#) (SWD (2025)0847)

¹⁹ Such as the flagship topic “Ports of the Future”, promoting replication across small and medium size ports and the Strategic Energy Technology Plan Flagship pre-commercial procurement topic aimed to de-risk renewable fuel technologies

Other EU initiatives like the EU startup and scalup strategy and the upcoming European Innovation Act will also contribute to this goal.

To support this goal, and in line with the EU Industrial Maritime Strategy, and the EU Ocean R&I Strategy, the **Commission will leverage public-private collaboration within the waterborne cluster, building on initiatives like the co-programmed Zero-Emission Waterborne Transport Partnership (ZEWTP) to fully incorporate ports and to highlight projects with high development potential as well as define a path to improve the uptake of EU innovation.**

Sector stakeholders should support the uptake and distribution of EU funded research, share best practices and developing partnerships and new business models, going beyond specific/local challenges and aiming to address wider market requirements, considering also the needs of small and medium sized ports.

2.5. Efficient and digital port operations and logistics chains

The rise in average waiting times at major EU ports in 2024²⁰ demonstrates that maritime connectivity is increasingly constrained by terminal productivity and hinterland interfaces, not sea access alone.²¹ Increasing vessel sizes are also when not supported by adequate port and hinterland capacities provide further challenges to the overall system²². Missing or inefficient hinterland links can lead to reverse modal shift. Often, lacking availability of space constitutes a barrier to efficient port operations and the strategic development and growth of port activities.

Strengthening links between ports across the EU through improved rail, and inland waterway connections can significantly reduce transit times and costs, ensuring a seamless flow of goods and improving interaction within the internal market and the rest of the world. Supply chains can become more efficient and reliable by cutting border delays, aligning standards, and enabling firms to source inputs and deliver goods more quickly across the EU.

The European Maritime Space (EMS)²³ is a key component of the trans-European transport network and the EMS coordinator will **prioritise in the upcoming EMS work plan the development of sustainable and green short sea shipping links, facilitate dialogue and collaboration between ports, with a specific focus on smaller ports, on the upgrade of maritime infrastructure and integration with rail and inland waterway transport.**

Member States and industry stakeholders should give higher priority to the availability and capacity of hinterland connections by rail and inland waterways, using the consultation provisions under the Port Services Regulation²⁴.

Concerning hinterland connectivity, the Commission will **strengthen rules on access to service facilities and rail-related services²⁵** to improve the efficiency of port rail connections and propose an **Action Plan on Inland Waterway Transport (IWT) for the period 2028-2034** to facilitate and increase the use of inland waterway transport and strengthen the role of inland ports.

Member States are called upon to ensure that port concessions and land lease contracts allow for sufficient flexibility to adapt port service activities to changing operational needs and strategic priorities of port development. Member States are also encouraged to streamline land use

²⁰ 2024 Global Port Congestion Review | Beacon, reference to be updated

²¹ Drewry, Ports & Terminals Insight, Q1 2025, 28/02/2025

²² https://www.oecd.org/content/dam/oecd/en/publications/reports/2017/01/the-impact-of-mega-ships_683374af/01200c27-en.pdf [source to be updated]

²³ https://transport.ec.europa.eu/transport-themes/infrastructure-and-investment/trans-european-transport-network-ten-t/european-maritime-space_en

²⁴ Regulation (EU) 2017/352 (OJ L 57, 3.3.2017, pp. 1–18, <http://data.europa.eu/eli/reg/2017/352/2020-05-28>)

²⁵ OJ L 307, 23.11.2017, pp. 1–13, https://eur-lex.europa.eu/eli/reg_impl/2017/2177/oj/eng

planning and permitting procedures to allow a swift development of new additional areas for port use.

Digital applications can optimise port calls, improve turnaround times, reduce waiting times and optimise use of resources, while reducing emissions and improving safety and security. A fragmented digital environment, reliance on legacy systems, data silos, lack of digital skills and high upfront investment costs are among the factors impeding the development of digital solutions.

EU digital initiatives, such as the European Maritime Single Window environment (EMSW^e)²⁶, the electronic freight transport information (eFTI)²⁷, the upcoming revision of the Union Customs Code²⁸ and the Rail Interoperability Directive²⁹ will genuinely facilitate B2G reporting and customs processes. However, in the B2B perspective, data exchange is fragmented and often bound to proprietary software, affecting general logistics efficiency and the competitiveness of short sea shipping. Therefore, better integration of systems at all levels is needed to achieve better supply chain visibility for operational optimisation without imposing centralised platforms or disrupting existing IT investments. In this regard, the Commission **will establish EU guidelines for efficient data sharing in the transport chain**, in conjunction with actions of Member States³⁰. It will build on the work of the Digital Transport Logistics Forum³¹ and the results of the EU funded project FEDeRATED³².

Flagship actions

- *Modernise and simplify State aid and competition rules ensuring fair competition and simpler access to funding for the EU ports sector, through a revision of the General Block Exemption Regulation, an updated analytical grid for State aid to ports and the upcoming revision of the merger guidelines.*
- *Modernise and clarify the concessions framework for ports and provide guidance for land-lease contracts.*
- *Develop criteria and guidance on foreign ownership and control in EU ports*

3. ADVANCE NEW ENERGIES, SUSTAINABILITY & REINDUSTRIALISATION

3.1. Ports as enablers of the energy transition

Ports are evolving into strategic energy and industrial hubs developing new business models and services across the generation, conversion, transport and storage of clean energy. They are increasingly active in electrification solutions, hydrogen and its derivatives, offshore renewable energy and sustainable fuels, creating new value chains and investment opportunities. Around 40% of commodities handled in EU ports are energy-related³³, and ports enable the annual deployment of around 3 GW of offshore wind. As such they are pivotal to achieving the EU Climate Law³⁴ objectives and economic security. Ports are also natural locations for integrated energy and industrial ecosystems, including

²⁶ Regulation (EU) 2019/1239 (*OJ L 198, 25 7 2019, 64–87*)

²⁷ Regulation (EU) 2020/1056 (*OJ L 249, 31 7 2020, 33–48*)

²⁸ Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL establishing the Union Customs Code and the European Union Customs Authority, and repealing Regulation (EU) No 952/2013 (*COM(2023), 258 final*)

²⁹ Directive (EU) 2016/797 (*OJ L 138, 26.5.2016, pp. 44, E.I.I: <http://data.europa.eu/eli/dir/2016/797/oj>*)

³⁰ Including the recent European Data Infrastructure Consortium for Mobility and Logistics and any relevant coalition of willing.

³¹ https://transport.ec.europa.eu/transport-themes/digital-transport-and-logistics-forum-dtlf_en

³² <https://www.federatedplatforms.eu/index.php>

³³ 'The new energy landscape, impact on and implications for European Ports', 7.

³⁴ Regulation (EU) 2021/1119 (*OJ L 243, 9 7 2021, 1–17*).

carbon capture and storage (CCS), hydrogen import and distribution, clean energy production onsite and offshore renewable energy, waste heat recovery and heat and cold storage.

[@DG ENER: please provide some figures to illustrate importance of clean energy production onsite and offshore renewable energy, waste heat recovery and heat and cold storage?]

The rapid scale-up of offshore renewable energy also creates growing challenges for ports. The increasing size of offshore wind components requires larger and reinforced port facilities for assembly, storage and deployment, while ports also face constraints related to limited space, grid connection and complex permitting procedures.

Electrification of ports: cornerstone of decarbonisation

Electrification of ports is a cornerstone of the energy transition in port areas, underpinning the decarbonisation of maritime transport, port operations and port-based industrial and logistics activities. It includes Onshore Power Supply (OPS) for ships at berth, electrified port operations and vehicles, charging infrastructure for heavy-duty transport and the electrification of adjacent industrial sites.

Progress is visible, with 62% of surveyed European seaports offering onshore power at one or more berths³⁵. Yet availability remains unevenly distributed and capacity constraints persist, while port electricity demand is expected to quadruple by 2030³⁶.

To ensure a coherent rollout of port electrification, the Commission **will continue to monitor OPS deployment** through the European Alternative Fuels Observatory³⁷. In the upcoming **Electrification Action Plan**, the Commission **will take further measures to support port electrification**, such as promoting electrification of industrial sites and clusters in port areas and in smaller and inland ports. In addition, the Commission **will promote increased transparency of OPS pricing**, together with improved forecasting of electricity demand and flexibility needs in ports.

Reinforced and efficiently managed grid capacity is essential as electricity demand in ports increases with OPS, electrification of port operations, charging stations for lorries operating in port areas, hydrogen production, logistics and greener industrial activities. To address this, **Member States should support smart-grid solutions, digitalised procedures and better reservation or commitment mechanisms that optimise the use of existing grid assets**, in line with the recently adopted grid package.

Beyond their local grid role, ports are also vital for offshore grid connections, hybrid infrastructure, and offshore energy corridors. The revised TEN-E proposal³⁸, together with the TEN-T Regulation support port infrastructure from different angles, enabling network planning, including ports, for anticipatory grid investment to enable offshore renewable deployment. **Member States should strengthen synergies between the TEN-T and TEN-E networks** to ensure coherent planning of port-grid connections and energy-transport interfaces, especially for offshore renewable energy corridors and their integration via port infrastructure. The Commission calls also on Member States to **support structured cooperation between ports and local industrial clusters**, promoting integration with local heating and cooling networks, energy sharing, storage and the development of port-centred energy communities in order to improve energy security and competitiveness in the ports and foster new business opportunities.

[@ENER: please propose an additional concrete action to support ports as energy hubs]

³⁵ ESPO, 'Environmental Report 2025' EcoPortsInSights 2025.

³⁶ *Port electricity commercial model (project pilot) – Final report*, Publications Office of the EU, 2024.

³⁷ The European Alternative Fuels Observatory (EAFO).

³⁸ Proposal for a revised Trans-European Network for Energy (TEN-E) Regulation (*COM(2025) 1006 final*).

Permitting and accelerated grid connections

Lengthy and complex permitting and grid-connection procedures delay or deter investment in port electrification, renewable energy, storage and clean-fuel infrastructure. Efficient and predictable permitting is therefore essential to enable timely investment in these projects. The **European Grids Package**³⁹ of December 2025 and the **Guidance on efficient and timely grid connections**⁴⁰ address these challenges by aiming to speed up connections to the grid for viable projects. Ports of all sizes will benefit from the proposed actions on grid-connection procedures, including maturity assessments and regularly updated grid hosting capacity maps.

In addition, under the proposal for a **revised Directive to accelerate permit-granting**⁴¹, **Member States should presume in their case-by-case assessments that electricity transmission and distribution infrastructure, including OPS in ports, are of overriding public interest.** This will facilitate the permitting for OPS and other public-interest port-electrification projects. **Member States should incorporate this approach in national procedures to ensure ports obtain timely grid access for strategic energy projects.** These measures are complemented by the Regulation on speeding up environmental assessments.

Multi-fuel ports

Ports play a key role in the rollout of sustainable maritime fuels and the development of a multi-fuel ecosystem that avoids technology lock-ins and reflects local conditions and market developments. However, uncertainty regarding future fuel demand, infrastructure needs and business cases can delay investment and increase the risk of stranded assets.

A multi-fuel approach is necessary to ensure flexibility and resilience. The EU regulatory framework⁴² already incentivises cleaner fuels in maritime transport and strengthens the role of ports as key energy and transport nodes. The Sustainable Transport Investment Plan⁴³ underscores that ports are essential for rolling out clean fuels and relevant energy infrastructure. **The Commission will, in the upcoming Energy Union Package, propose measures to ensure adequate availability of sustainable maritime fuels in ports,** including minimum supply obligations for fuel suppliers⁴⁴.

The deployment of new fuels requires dedicated storage and bunkering infrastructure in ports, with renewable or low-carbon fuels posing specific safety and operational challenges that are further addressed in Section 6.

To guide investment planning, the **Renewable and Low-Carbon Fuels Alliance**⁴⁵ will, by the end of 2026, **map infrastructure capacity and future needs for the supply of renewable and low-carbon fuels in and to ports.**

Industrial clusters & energy communities in port areas

Ports are key enablers of Europe's clean-energy-based re-industrialisation. However, fragmented planning, limited coordination between ports and surrounding industrial clusters, and uncertainty around future energy infrastructure needs can slow down investment and reduce system efficiency.

³⁹ The proposed [European Grids Package](#).

⁴⁰ Commission Notice "Guidance on efficient and timely grid connections" ([COM/2025/8473 final](#)).

⁴¹ Proposal for a revised Dir. to accelerate permit-granting procedure of infra projects ([COM\(2025\) 1007 final](#)).

⁴² This includes the Alternative Fuels Infrastructure Regulation, the FuelEU Maritime Regulation, and the inclusion of maritime transport in the EU ETS, as well as the TEN-T and TEN-E Regulation,

⁴³ Commission's Communication on 'Sustainable Transport Investment Plan' ([COM/2025/664 final](#)).

⁴⁴ In line with the EU Renewable Energy Directive.

⁴⁵ https://transport.ec.europa.eu/transport-themes/clean-transport/alternative-fuels-sustainable-mobility-europe/renewable-and-low-carbon-fuels-value-chain-industrial-alliance_en

To address this gap, the Commission will **strengthen the role of port areas as clean-energy and energy efficient industrial hubs**. Hydrogen import terminals are included in the TEN-E framework if they serve cross-border needs, and ports can play a central role in hydrogen valleys and integrated hydrogen ecosystems for production, storage, distribution and end-use⁴⁶ in line with the long-term role of hydrogen in ports and industrial coastal areas⁴⁷. The Clean Hydrogen JU will commission a **study in early 2026 to support the Commission's activities within the Global Ports Coalition** under the Clean Energy Ministerial. Building on this and to support the development of hydrogen and derivative fuels in ports, the Commission will promote **partnerships with ports, local authorities and industrial clusters to jointly plan, invest in and deploy solutions and technologies to improve efficiency**. In addition, to support local energy integration and energy sharing in port areas, the Commission **will also provide guidance to promote the development of port-centred energy communities**.

To strengthen coordination and remove bottlenecks, enhanced cooperation between ports, energy companies, grid operators and local authorities is encouraged to identify electrification needs and address constraints. The Commission also **stands ready to provide informal guidance on antitrust issues related to such cooperation** as it has done recently in support of a Joint Purchasing and Specification Agreement between terminal operators regarding electric container handling equipment⁴⁸.

To support implementation, the Commission **will organise a series of targeted workshops for ports**, on the application of EU energy legislation, the integration of renewables, hydrogen and alternative fuels and deploying offshore and net-zero technologies, including CO₂ management and storage.

BOX – Placeholder - a new roadmap for small ports

A short box to highlight the potential of small and medium ports and refer to actions already in other parts of the text included in sections 3.1 (the electrification plan, targeted workshops), 4.1 (security standards), 4.2 (resilience), 4.4. (cybersecurity), 5. (access to finance, support).

[@ENER, REGIO and MARE: in addition to the workshops, please consider additional concrete actions to support the role of smaller ports in the sustainable blue economy, links to hinterland and regional development and the energy transition, e.g. support to SMEs, exchange of best practices...]

3.2. Strengthening environmental sustainability in ports and simplifying permitting procedures.

Ports are complex ecosystems where transport, industrial and environmental activities converge, making them both vital economic assets and environmentally sensitive areas⁴⁹. Ensuring their sustainable growth requires balancing competitiveness with strong environmental protection. Strengthening environmental sustainability in port areas must go hand in hand with enabling the timely delivery of decarbonisation. A strong legal framework⁵⁰ already exists and allows for flexibilities in

⁴⁶ The Clean Hydrogen JU supports hydrogen valleys since 2019, dedicating EUR 253.4 million to 21 projects.

⁴⁷ Study on hydrogen in ports and industrial coastal areas – Reports - Clean Hydrogen Partnership

⁴⁸ Case AT.40976 – APM Terminals, guidance letter dated 9.7.2025 *COM/2025/4523 final*).

⁴⁹ With impacts on air, noise and water pollution, and biodiversity loss. Study on Greening of European sea ports - European Commission.

⁵⁰ Built on the Habitats and Birds Directives, the Ambient Air Quality Directive, the Nature Restoration Regulation and complemented by the Maritime Spatial Planning Directive and the Marine Strategy Framework Directive (soon to be revised).

cases of overriding public interest. Broader EU policies⁵¹ further support pollution reduction, ecosystem restoration, nature-based solutions and the development of a sustainable blue economy, while the European Ocean Pact⁵², addresses ports' roles in protecting marine ecosystems.

To address bottlenecks and improve predictability, the proposed **Regulation on speeding-up environmental assessments**⁵³, complementing measures to accelerate permit-granting for energy, targets key delays. It covers port infrastructure and port decarbonisation, providing for faster procedures, in case of overriding public interest⁵⁴, as well as the use of tacit approval for intermediary permitting steps when deadlines are not met. **Member States should align national permitting systems with these accelerated rules and reduce unnecessary administrative burden.**

Uneven implementation continues to hinder project delivery and environmental protection. To address this, the Commission will **update, complete and consolidate the environmental guidance for ports, covering all relevant environmental EU legal acts**, to deliver a clearer, more predictable and harmonised framework for application, thus improving implementation and environmental sustainability.

In addition, the recent revision of the Water Framework Directive⁵⁵ introduces simplified procedures for projects causing temporary deterioration as well as procedures allowing chemical deterioration resulting from the relocation of polluted water or sediments without increasing overall pollution.

As ports transition to clean fuels, hazardous waste streams⁵⁶ change and will require appropriate reception facilities. **Member States should implement the flexibilities and provisions under the Water Framework Directive relevant for port development and ensure a timely implementation of new international rules addressing sea pollution from shipping in ports** that will enter into force⁵⁷.

Ports also play an important role in supporting the circular economy by enabling resource efficiency, waste valorisation and industrial symbiosis in coastal and urban areas. The **upcoming Circular Economy Act, the RESourceEU Action Plan**⁵⁸ and the **Industrial Accelerator Act**⁵⁹, support ports to become strategic hubs for circular activities, such as large-scale scrap-metal recycling and advanced materials processing or ship-recycling, powered by clean energy.

Measuring the environmental footprint of the multiple and complex activities that take place within a port area and accurately identifying sources of emissions and other pollutants, is a complex exercise⁶⁰. While attempts are undertaken by ports, with the support from EU projects⁶¹, the lack of an agreed

⁵¹ Including the 2020 [Circular Economy Action Plan](#), the 2021 [EU Strategy on Adaptation to Climate Change](#) and the 2025 [Water Resilience Strategy](#).

⁵² The European Ocean Pact ([COM/2025/281 final](#)).

⁵³ Proposal for a Regulation on speeding-up environmental assessments ([COM\(2025\) 0391 final](#)).

⁵⁴ Subject to conditions in Directive 2000/60/EC, Directive 2009/147/EC and Directive 92/43/EEC.

⁵⁵ Directive 2000/60/EC ([OJ L 327, 22 12 2000](#)).

⁵⁶ For example, residues from ammonia or hydrogen.

⁵⁷ Under the OSPAR Convention, discharges from scrubbers operating in open and closed loop systems will be prohibited in internal waters and port areas from 2027, with a possible extension to territorial waters. (OSPAR Commission, Decision 2025/01 on the Management of Discharge Water from Exhaust Gas Cleaning Systems in Internal Waters and Port Areas, Doc. 2025/14/1, Annex 18). Similar developments are progressing fast also in the context of the Helsinki Convention.

⁶⁰ The European Maritime Transport Environmental Report (EMTER) 2025 e.g. points to the lack of data on air quality in port: [European Maritime Transport Environmental Report 2025 | Publications | European Environment Agency \(EEA\)](#).

⁶¹ To add links

approach, methodology and wide application, is the clear appreciation of the problems, limits potential solutions, and the assessment of the real impact of policies and measures. To address this challenge, the Commission will **improve the harmonisation of measuring and reporting emissions in port areas**. The Commission will also **support research and innovation to improve the assessment, monitoring and mitigation of environmental impacts from port activities**, including in EU and neighbouring urban and coastal areas.

Flagship Action

- *Accelerate permit-granting procedures and provide faster assessment procedures for strategic energy and environmental port-related projects.*
 - *Reinforce the role of port areas as clean-energy and industrial hubs by accelerating port electrification, access to grid, and deployment of clean energy, including hydrogen.*
 - *Update, complete and consolidate the environmental guidance for ports, covering all relevant environmental EU legal acts*
-

4. PROTECT & SECURE PORTS

4.1. Internal security

Each year, more than 90 million containers pass through Rotterdam, Antwerp, and Hamburg. The shifting geopolitical landscape has amplified both traditional threats, such as terrorism, sabotage, organised crime and corruption, and prompted emerging ones like cyber and hybrid threats as well as the malicious use of airborne and water drones.

Criminal networks smuggle drugs into EU ports via increasingly diverse maritime routes and means, also reaching smaller and inland ports. Criminal infiltration in the maritime logistics chain through extreme violence and corruption, hybrid threats and illegal production of illicit goods hamper operations, impact the (local) economy and increase costs. Workers in ports need to be better trained and protected as partners in the fight against organised crime and cyber threats. Passenger terminals and commercial maritime transport can be exploited by terrorists and organised crime for trafficking, human trafficking and the covert movement of terrorists, highlighting the need for improved data collection and analysis.

The ProtectEU: European Internal Security Strategy⁶² underlined the importance of ports as prime targets for external threats and criminal activity and foresees implementation of maritime security legislation to counter emerging threats related to drones and undersea cables and enhance port and supply chain security. To tackle criminal networks, the Commission will present in 2026 an **EU Anti-Corruption Strategy**, building on the Directive on combatting Corruption and involving the EU Network on Corruption.

EU Maritime Security legislation combines the Regulation on enhancing ship and port facility security⁶³ with the Directive on port security⁶⁴ for port facilities and terminal operators⁶⁶. The Commission, supported by the MARSEC Committee and SAGMAS advisory group, will **update and revise existing guidance to adequately cover all relevant threats**, including measures on emerging threats such as

⁶² Communication ProtectEU: a European Internal Security Strategy, COM/2025/148 final.

⁶³ Regulation 725/2004 (OJ L 129, 29.4.2004, pp. 6–91)

⁶⁴ Directive 2005/65/EC (OJ L 310, 25/11/2005, pp. 28-39)

⁶⁶ ⁶⁶based on IMO legislation on International Ship and Port Facility Security (ISPS) code:
<https://www.imo.org/en/ourwork/security/pages/solas-xi-2%20isps%20code.aspx>

cyber and hybrid threats, illicit trafficking and malicious use of non-military drones, with assistance from the European Maritime Safety Agency (EMSA) and the EU Agency for Cybersecurity (ENISA).

In line with the ProtectEU Strategy, the European Ports Alliance to fight drug trafficking and organised crime, launched in January 2024, facilitates cooperation between law enforcement, customs, port authorities, logistics actors and further stakeholders to combat drug trafficking by strengthening the resilience of ports and their personnel and by sharing best practices and identifying operational gaps. Drawing on the work of the European Ports Alliance, the Commission will **work on an EU framework for background checks for port workers** and the **streamlining of data-exchange** between and within Member States. Moreover, the Commission will work on **raising security standards in those inland ports that are not subject to the ISPS-Code, in cooperation with the river commissions. The Commission will publish a summary of best practices based on the exchanges of the European Ports Alliance Public Private Partnership to fight drug trafficking and organised crime.**

To alleviate pressure on EU ports in the fight against drug trafficking, prevention and detection of cargo contamination and criminal infiltration of vessels by organised crime need to be tackled already at departing third country ports. This requires a **framework for third country port assessments to increase capacity building and local law enforcement, supported by Global Gateway projects and targeted joint assessments in high-risk third country ports.**

More uniform and effective customs controls across EU ports together with better security protocols worldwide, such as “Do Not Load”, can protect EU parties and maintain a level playing field across the EU. The Commission will **work on public-private two-way information exchange between customs and maritime logistics companies and exchange of data between private actors on drug trafficking under the anti-trust instruments.** The proposed EU Customs Authority and DataHub⁶⁷ will use customs data to enhance risk analysis and counter the criminal misuse of international supply chains. It will also help ports in applying uniform and cost-effective customs rules.

Member States **should reinforce the implementation of maritime security legislation, adopt best practices developed by the European Ports Alliance to combat organised crime and corruption,** and address all elements of effective port security, ensuring sufficient maritime security staffing and prioritising essential investments.

4.2. Improve the resilience of ports and logistics networks

Ports are situated at the interface of land, sea and critical infrastructures. The flow of critical goods and military mobility are essential for the EU’s resilience. Attacks on EU transport infrastructure are increasing through drones, acts of sabotage and cyberattacks, with local incidents threatening the functioning of complex logistics chains. Extreme weather conditions due to climate change impact the resilience of ports increasingly.

Defining resilience for ports

The resilience of ports encompasses the capacity to maintain the functionality of critical transport infrastructure and logistics networks. This includes climate adaptation, ensuring infrastructure and operations can withstand extreme weather and other climate-related impacts, as well as operational resilience, enabling ports and connected networks to absorb, respond to, and recover from major incidents, accidents, or malicious events, including cyber and hybrid threats. Port resilience also

⁶⁷ EU Customs Reform - Taxation and Customs Union - European Commission)

accounts for the strategic role of ports within broader networks, including their contribution to military mobility, ensuring continuity of both civilian and defence-related supply chains.

Climate change and environmental challenges such as sea level rise, floods, water scarcity, saline intrusion can impact the navigability and the operation of docks. In line with the 2021 EU Adaptation to Climate Change⁶⁸ and the 2025 European Water Resilience Strategy⁶⁹, ports must systematically assess and embed climate risks in port planning, infrastructure design, and hinterland connectivity. To support Member States on preparedness and resilience planning, the **Commission will publish a European Climate Adaptation Plan (ECAP) in 2026.**

Member States and ports should develop **adaptation plans to mitigate climate change effects**, counter environmental degradation and enhance preparedness for environmental hazards. They will be invited to **exchange best practices on (climate and water) adaptation and climate risk assessments in ports**, in the context of the European Maritime Space.

Accidents and malevolent events are a significant threat to EU infrastructure. Cyberattacks and acts of sabotage have exposed the vulnerability of interconnected networks and ports. As a transport network is only as strong as its weakest link, sufficient redundancy and alternative connections in the TEN-T network are critical to protect supply chains, prevent systemic economic shocks and ensure military mobility.

The Critical Entities Resilience Directive⁷⁰ requires Member States to identify critical entities that provide essential services across key sectors (including all core TEN-T ports and other relevant ports). Criteria include multi-use functions (e.g. water, energy, and digital infrastructure), strategic roles in supply chain resilience, stockpiling, military mobility and combating illicit trafficking and organised crime. Member States should carry out risk assessments according to article 5 of the CER Directive to identify their critical ports and to ensure they take measures to mitigate and prevent risks. **The Commission will in 2026 publish guidance to Critical Entities** to facilitate this. Handling and storage of critical goods should be ensured with the Member States, in line with military mobility requirements and the EU stockpiling strategy⁷¹. Optimised mapping, information sharing and coordination between Member States should be implemented to protect stockpiles and minimise disruptions to civilian and defence supply chains recognising the specific role of smaller ports.

The Commission will focus on enhancing the resilience of EU ports and their connections to the hinterland through innovative solutions, as outlined in point 2.4 and in the funding priorities, as described in point 5, addressing climate resilience, accidents, hybrid and external threats. As a new focus activity, **the EMS coordinator will facilitate resilience planning through workshops with other European Transport Corridor Coordinators to explore contingency options for maritime and hinterland connectivity should major ports on key transport routes be disrupted.**

Non-functioning rail links frequently undermine the resilience of ports supply chains due to capacity constraints, terminal and border bottlenecks, and long waiting times due to limited track availability, suboptimal scheduling, and poor coordination among infrastructure managers, operators, and terminals. Directives (EU) 2016/797, (EU) 2016/798, and 2007/59/EC, ensure interoperability of ports within the EU rail system and supporting efficient hinterland connections. The Regulation on the use of railway infrastructure capacity⁷² allows rail companies to adapt use of trains at shorter notice and requires

⁶⁸ EU Strategy on Adaptation to Climate Change, COM/2021/82

⁶⁹ European Water Resilience Strategy, COM(2025) 280

⁷⁰ Directive (EU) 2022/2557 (OJ L 333, 27.12.2022, 164–198).

⁷¹ EU stockpiling strategy: Boosting the EU's material preparedness for crisis (COM(2025) 528)

⁷² (COM(2023) 443 final. The reference of the COM proposal is to be replaced by the one of the adopted act).

infrastructure managers to provide viable routing alternatives in case of major disruptions. Member states should remove exemptions and fully implement these Directives in order to achieve a more resilient supply chain.

Where available, inland waterways and inland waterway terminals can play an important role in the redundancy of the network and the strengthening of supply chain resilience with Member States actively implementing measures to achieve a “Good Navigation Status” by 2030.

Member States and stakeholders should take the necessary measures to protect and strengthen vulnerable infrastructure and bottlenecks and should ensure that they have sufficient redundancy and capacity to absorb short and medium term disturbances in their logistic chain and provision of critical goods.

4.3. Digital autonomy for the EU's economic security

Data exchange in EU ports is often dependent on foreign hard- and software, with data stored outside the EU. The vulnerabilities of digital systems and processes are increasingly exploited by criminals for drug trafficking as well through cyberattacks by unfriendly State actors. While cybersecurity issues require dedicated action (see below), the EU also needs to step up and gain its digital sovereignty over data underpinning its vital civil and military transport. Digital sovereignty with secure automation solutions, use of AI and next generation connectivity (5G/6G, GNSS) is essential. This also requires trained operators and workers conscious of their vital role in the safe functioning of this segment of the EU critical infrastructure networks. Together with the Industrial Maritime Strategy, a new focus on digital autonomy will provide opportunities for EU enterprises and entrepreneurs to develop and deploy tomorrow's digital solutions to counteract the EU's strategic dependence and increase detection and counteraction against criminal activities.

Digital autonomy for ports

The Commission will develop a new initiative, supported by the competitiveness coordination tool, to secure data exchanges and data storage for ports and stakeholders along multimodal logistics chains. This will complement the development of data exchange standards and contribute to the common European mobility data space⁷³. Together with Member States, transport, logistics and IT industry, the Commission will promote and support solutions towards EU data sovereignty and seek cooperation with likeminded countries. The aim is to safeguard the EU's independence on digital infrastructure and software used to power vital supply chains. This includes “Do Not Load” flagging for secure maritime transport chains departing from third country ports.

4.4. Cybersecurity

Ports face major cybersecurity challenges due to their complex infrastructure, services, and diverse stakeholders. Rapid digitalisation and automation have increased security risks, potentially affecting global supply chains and critical EU infrastructure. GPS jamming and spoofing can lead to collisions at sea or in ports. Concerns grow over high-risk suppliers controlling key port infrastructures, equipment, and logistics solutions, which may lead to data leakage and disruptions.

Maritime cybersecurity is a key element of EU port and ship security legislation, addressed globally through the IMO's ISPS Code and horizontally in the NIS2 Directive⁷⁴, the Cyber Resilience Act⁷⁵ and the Cyber Solidarity Act⁷⁶.

⁷³ COM(2023) 751 final

⁷⁴ Directive (EU) 2022/2555 (NIS 2 Directive). (OJ L 333, 27.12.2022, pp. 80–152)

⁷⁵ Regulation (EU) 2024/2847 Cyber Resilience Act (OJ L, 2024/2847, 20 11 2024)

⁷⁶ Regulation (EU) 2025/38 Cyber Solidarity Act (OJ L, 2025/38, 15 1 2025).

The ENISA Cyber Risk Management for Ports guidelines⁷⁷ and the EMSA Guidance on addressing cybersecurity onboard ships⁷⁸, help with implementation and detection, preparedness, and resilience. The Commission will continue cooperating with IMO to **advance harmonised global cybersecurity standards for the maritime sector through a non-mandatory Cyber Code. ENISA will update the Cyber Risk Management for Ports guidelines** with state-of-the-art measures and latest EU policy developments such as the NIS2 Directive).

Together with the NIS Cooperation Group and ENISA, the Commission will conduct a **Union-wide coordinated port cyber security risk assessment** under the NIS2 Directive, to identify risks and mitigating measures, including potential exclusion of high-risk suppliers. If deemed necessary, the Commission will carry out **coordinated preparedness testing and/or drilling exercises at ports on specific cybersecurity risk scenarios** aimed at improving the sector's readiness for large-scale cybersecurity incidents, in line with the cyber crisis management Blueprint and taking into account the challenges of smaller ports.

Based on the NIS2 Directive and supported by ENISA, the Commission will establish an **EU information sharing platform for administrations and stakeholders** for the exchange of best practices, incident reporting and to develop common cybersecurity approaches between Member States and, where relevant, with private stakeholders while also strengthening information exchange between ENISA and the European Maritime Information Sharing Analysis Centre (EM-ISAC).

Finally, the digital omnibus will establish a single-entry point for all obligatory reporting of cyber security incidents.

Flagship Actions

- *Strengthen port security through updating and revising existing guidance, including on emerging threats.*
 - *Establish a framework for third-country port assessments to fight drug trafficking, building on concluded pilot projects and enhance cooperation related to hazardous cargo procedures in the EU and third countries.*
 - *Explore an EU framework for background checks for port workers.*
 - *Establish an EU-wide maritime and port cyber information sharing platform to exchange information and best practices between maritime and cyber authorities, making use of the available tools under NIS2 Directive and incorporating ENISA's expertise.*
-

5. ACCESS TO FINANCE & INVESTMENT

The Draghi report reconfirmed the strategic investment needs for the transport sector. Stakeholders consistently underline that ports' challenges and evolving roles described in the previous chapters can only be addressed through a mix of EU, national and private funding, supported by predictable regulatory frameworks and de-risking tools. Stakeholders have provided estimates on investment needs⁷⁹, arising from increase in trade flows, decarbonisation efforts, increasing vessel size, sustainability and resilience needs. Highlighted funding bottlenecks include access to secure funding, cost increases and lengthy and costly permitting procedures.

⁷⁷ ENISA, *Cyber Risk Management for Ports: Guidelines for cybersecurity in the maritime sector*, Dec 2020.

⁷⁸ (<https://www.emsa.europa.eu/publications/inventories/download/7660/5074/23.html>)

⁷⁹ ESPO estimated that EU port authorities will need around EUR 80 billion to cover a wide range of investments
ESP-3217_InvestmentStudyReport2024_I.R.pdf

Public funding reduces risks for private investors and enables projects with significant public and societal value. It is indeed an important source in particular for projects addressing public and societal challenges. However, public funding alone cannot cover port's needs, and thus needs to be targeted in such a way that maximises its impact. **In order to improve coordination and efficiency of EU funding for ports, common criteria are required.**

Maximise the impact of public funding by applying common criteria to all relevant funding streams, in particular:

Clear priorities

- Public funding should focus on highest and catalytic impact in addressing public and societal challenges.
- Support by grants should be limited to projects directly addressing public interest beyond what would normally be financed under market conditions. In addition, specific support could be given to leverage and de-risk private investments.
- Public priorities should include the resilience of critical supply and logistics chains, connectivity for islands and outermost regions, the provision of green fuels including electricity, port electrification and grid connections, green infrastructure and sustainable port operations, dual-use capabilities and physical and digital port security, fighting crime and drug trafficking, creating employment opportunities, circular economy, reduction of waste generation, and recycling.
- Development of EU innovative solutions should be encouraged and their deployment and use in implementation projects should be enhanced.
- Support the development of a resilient network of ports with sufficient redundancy, able to ensure critical supply and logistic chains, military mobility, and connectivity in particular for islands and outermost regions.
- Funding in green infrastructure and port equipment should be made available to those EU ports directly exposed to unfair competition from 3rd country ports.

Clear conditions

- Public funding to entities in EU ports should be conditional on the timely implementation of relevant EU legislation, such as maritime security or environmental legislation, and respect of best practices as regards port concession and land-lease agreements.
- Public funding to entities in EU ports directly or indirectly controlled by foreign interests should be carefully assessed and where needed limited in view of EU public interests linked to critical or dual use infrastructures.
- “Made in the EU” solutions should be encouraged in EU ports and synergies between sectors should be explored.

The EU has been supporting port projects covering energy, sustainability, connectivity, innovation and other aspects under several instruments since 2014⁸⁰. The **EU is committed to supporting the sector** under the current MFF, including the upcoming CEF-Transport call to support the development of OPS and greening of ports (EUR [XXX]), the MARE start up call (EUR [XXX]), as well as Horizon Europe

⁸⁰ For example, CEF-T (EUR 3.9 billion), (EUR 856 million), the ERDF and Cohesion Fund programmes (EUR 3.7 billion), the Innovation Fund (EUR 600 million), and the Horizon 2020 and Horizon Europe (EUR [218] million), and the Invest EU has provided (EUR [XXX] million)]. Furthermore, under the Recovery and Resilience Facility (RRF), Member States allocated nearly EUR 500 million to investments related to ports, while EIB has provided approximately EUR [2.6] billion in support to port infrastructure projects.

(EUR [80] million) and the Innovation Fund. At the same time, Member States have allocated EUR [1.97] billion in 2021-2027 Cohesion policy funds (ERDF, Cohesion Fund, Interreg) to ports.

Under the next Multiannual Financial Framework (2028-34), the proposed **European Competitiveness Fund (ECF)** could help the ports sector to implement high-quality, *made-in-Europe* innovations. This could in particular, support investments in clean, secure, dual-use, multimodal and digitalised infrastructure, superstructure and equipment in ports, including charging infrastructure and blue tech.

The **Connecting Europe Facility 2028-2034 (CEF3)**, with a proposed transport budget of EUR 51.5 billion will be a key EU instrument with ports as part of cross-border connectivity funding priorities⁸¹. Within the future 10th R&I framework and the new Multiannual Financial Framework, the **Commission will propose priority actions in line with the common criteria mentioned above and suitable partnerships to support innovation in ports**. Support for transport infrastructure projects can also be available through National and Regional Partnership Plans (NRPPs), and **Member States should, depending on their local needs and circumstances, to align with the strategy and include such projects as priority in their NRPPs**, in particular for small and medium ports.

For demonstration and pre-deployment, through the Innovation Fund, the Commission will make available 20 million EU ETS allowances (EUR 1.5 billion⁸²) that have been earmarked until 2030 to support emissions reductions in the maritime transport sector and advance innovation across the maritime sector, from ports to shipbuilding.

The European Investment Bank Group (EIB Group), has in the period 2014-2025 provided support to projects in maritime and inland port with approx. EUR [2.8] billion, including projects on climate resilience, decarbonisation, cohesion, innovation, digitalisation, security and defence, offshore renewables and alternative fuels. The EIB Group will continue making its financing and advisory offer available to support the priorities of the strategy, fostering accessibility to its financial support and technical assistance for ports and businesses of all sizes. It will notably continue to develop financial instruments, such as framework and programme loans, that **facilitate access to its financing for ports of all sizes**, and to mobilise dedicated technical and financial advisory to assist TEN-T ports, by providing support to project preparation, market development and capacity building. The Commission will, as an assignment under the JASPERS CEF mandate, request **the EIB to further develop this advisory function specifically for small and medium ports**.

Furthermore, **the Commission will engage with National Promotional Banks and Institutions and private financial stakeholders to identify additional financing solutions** for maritime and inland waterway ports and operators.

The dynamic landscape of the global port industry is witnessing a shift beyond core business activities, expanding to new technologies and innovations that unlock fresh opportunities. Many ports are already successfully diversifying, yet there remains potential for further growth. **EU ports, should pursue forward-thinking, out-of-the box strategies, integrating cutting-edge technologies and innovative sustainable practices so as to, create new revenue streams, remain competitive and resilient in future market conditions and enhance attractiveness to investors**. In particular, small and medium ports stand to benefit from energy transition and digitalization which can provide important business opportunities for them to develop their market presence and competitiveness.

⁸¹ The Connecting Europe Facility 2028-2034 includes a proposed budget of EUR 29,9 for the specific objectives on energy. See [Proposal for a Regulation establishing the Connecting Europe Facility for the period 2028-2034, amending Regulation \(EU\) 2024/1679 and repealing Regulation \(EU\) 2021/1153 \(COM \(2025\) 547](#).

⁸² With a price of EUR 75 per EU allowance.

6. SOCIAL COHESION, SKILLS & QUALITY JOBS

6.1. Ports as connectors

Being home to 20 million EU citizens²⁹, islands and Outermost Regions face distinct economic, sustainability, connectivity, social and development challenges. Ports are vital for communities depending on maritime transport of passengers and goods, especially on islands and outermost regions. Ports support local livelihoods, coastal communities' economies, innovation and improve accessibility. Industrial development and innovative maritime clusters in ports improve the local economy, while waterfront public and private spaces increase the attractiveness of cities. This may result in competition for space and a negative environmental impact in densely populated areas.

The Commission **will continue to support territorial cohesion and the connectivity of islands and Outermost Regions** through **Cohesion policy funding and the Connecting Europe Facility (CEF)** and invites Member States to support infrastructure, clean energy and fuel, safety, and sustainability improvements for small and medium sized ports, notably on islands and in outermost regions.

The Commission will **include policy measures to strengthen the economic, environmental and social contributions of ports to local communities in the framework of the upcoming Island and Coastal Communities Strategy**. Port-city interactions require balancing economic, environmental and social factors. The Commission will **strengthen dialogues and support the development of best practices and guidance on enhancing port-city relations**⁸³.

6.2 A skilled workforce and safe working conditions in EU ports

A skilled and continuously trained workforce is critical to delivering the fair, clean and digital transitions in ports and associated blue economy activities. The EU provides support to social dialogue at EU level and to upskilling and reskilling⁸⁴. A new Blue Generational Renewal Strategy under the European Ocean Pact, planned for 2027, will help develop a **skilled next-generation workforce across all blue economy sectors, including ports**.

Under a reinforced Pact for Skills, the Commission calls on the **social partners, ports and other stakeholders to establish a dedicated skills partnership for the ports sector** to anticipate skills needs, address shortages and promote inclusive access to quality jobs, in particular for women and young people. **The maritime industry, including ports, should submit pledges under the Cybersecurity Skills Academy** and use the European Cybersecurity Skills Framework (ECSF) tool for port professionals.

Protecting the health and safety at work of port workers is fundamental for good and attractive working conditions. The EU acquis on occupational safety and health (OSH) applies to ports. Recent amendments⁸⁵ have furthermore clarified the application of maritime transport accident investigation rules relating to port workers on board of ships. The Directive on Port State Control, as recently amended⁸⁶, provides for a system of targeted compliance spot checks of vessels calling to EU ports. To further enhance safety and security, **EMSA will develop guidance on the application of maritime safety legislation to port workers on board ships**.

⁸³ through the EU Mission Climate-Neutral and Smart Cities, the EU Mission Restore our Ocean and Waters, the European Ocean Pact, the Coastal Communities Strategy, the source-to sea angle of the Water Resilience Strategy. EU urban initiatives, such as the Green City Accord and the Covenant of Mayors encourage the pursuit of ambitious environmental and climate-related goals in port cities.

⁸⁴, building on initiatives such as the Council Recommendation on a fair transition towards climate neutrality, the Net-Zero Industry Act (including net-zero academies), and the Quality Jobs Roadmap

⁸⁵ Directive (EU) 2024/3017 (OJ L, 2024/3017, 6.12.2024).

⁸⁶ Directive (EU) 2024/3099 (OJ L, 2024/3099, 16.12.2024 - [Directive - EU - 2024/3099 - EN - EUR-Lex](#))

The EU will also support further research and guidance on the **safe handling of alternative, renewable and low- and zero-carbon fuels in port area** under Horizon Europe and continue to promote high labour standards and good practices internationally.

Member states should increase their support to infrastructure, safety and sustainability improvement projects for ports in islands and outermost regions and ensure implementation and respect of Union and national labour legislation and collective bargaining agreements.

Flagship Actions

- *Develop a skilled next-generation workforce across all blue economy sectors, including ports, through actions under the Blue Generational Renewal Strategy.*
- *Support social partners and relevant stakeholders to establish a skills partnership for the ports sector on upskilling, reskilling and inclusion of workers.*
- *EMSA to prepare guidance on the application of maritime safety legislation to port workers on board ships.*
- *EMSA to prepare guidance on safe handling of alternative fuels in ports.*

7. CONCLUSION

This Strategy highlights the vital role of ports for the EU economy and our society. It sets out a framework to future-proof the EU ports sector, improve its competitiveness, and expand ports' role for society in a secure, safe and sustainable way, and increase resilience, military mobility and cybersecurity. Close work with stakeholders on port-related policies is crucial. We will set up a high-level EU Ports Board, which will be instrumental in supporting the Commission's tasks of monitoring and ensuring the effective implementation of the EU Ports Strategy.

ANNEX: Summary of measures

Pillar I – GLOBAL COMPETITIVENESS, INNOVATION & DIGITALISATION

The Commission will:

- In 2026 revise the merger guidelines to address both horizontal and non-horizontal effects of mergers.
- In the 2026, revise the General Block Exemption Regulation to take into account new challenges.
- In the 2027, update of the analytical grid for State aid on ports, clarify priorities and conditions of investment support.
- In 2027, modernise the concession framework to take into account new challenges.
- By 2028, develop guidance for best practices for land-lease agreements in ports.
- By 2027, develop additional guidance to Member States for the ports sector, with criteria for assessing foreign investments under the various horizontal instruments in place.
- As of 2026, apply clear guiding principles in prioritising mutually beneficial projects in third country ports.
- [Placeholder IMO and level playing field]
- As of 2026, support EU businesses to obtain fair investment conditions and market access in port infrastructures and operations abroad, via the EEAS and EU Delegations
- By XXX, develop guidance to Member States for the ports sector, with criteria for assessing foreign investments.
- By XXX, develop a framework for mapping and monitoring of foreign investments.
- As of 2026 place stronger emphasis in addressing the “valley of death” in port innovation projects.
- As of 2026, focus research to priority areas and prioritise the results of EU research in implementation projects
- As of 2026, leverage on public-private collaboration within the waterborne cluster.
- In 2026, strengthen rules on access to service facilities and rail-related services.
- In 2027 propose an Action programme on Inland Waterway Transport (IWT) policy, for the period 2028-2034, as a follow-up to the NAIADES III program.
- By 2028, establish EU guidelines for efficient data sharing in the transport chain.

The European coordinator for the European Maritime Space (EMS) will:

- prioritise in the upcoming EMS work plan the development of sustainable and green short sea shipping links, facilitate dialogue and collaboration between ports, with a specific focus on smaller ports, on the upgrade of maritime infrastructure, and aim for seamless integration of ports with rail and inland waterway transport.
- facilitate resilience planning through workshops with other European Transport Corridor Coordinators to explore contingency options for maritime and hinterland connectivity should major ports on key transport routes be disrupted.

Co-legislators are invited to:

- adopt the Military Mobility Regulation as soon as possible.

Member States are invited to:

- ensure that bidders from markets that exclude EU operators do not benefit from unqualified access to EU port-related concessions and procurement opportunities.

- put in place stricter rules on the ownership and control of strategic dual-use infrastructures and its related operations and equipment as well as mitigate and address already existing risks of foreign ownership of control in addition to the FDI Screening Regulation.
- Take without delay, all necessary legal steps under national law to ensure the possibility of gaining temporary public control or right of use of strategic infrastructure, assets or equipment.
- Implement the provisions of the Military Mobility Regulation.
- Be at the forefront of establishing voluntary technical international standards and fully engage in the appropriate international fora such as ISO.
- Give high priority to improving the availability and capacity of hinterland connections by rail and inland waterways.
- Streamline land use planning and permitting procedures to allow a swift development of new additional areas for port use.

Sector stakeholders are encouraged to:

- Support the uptake and distribution of EU funded research, share best practices and developing partnerships and new business models, going beyond specific/local challenges and aiming to address wider market requirements, considering also the needs of small and medium sized ports.

Member States and stakeholders are invited to:

- Ensure appropriate duration, open renewal conditions and use flexibility clauses (in response to security, social and environmental needs), promoting “made in EU” innovative solutions, and accelerating achievement of EU policy objectives, when issuing or renewing port concessions. In particular, for ports critical for military mobility and strategic autonomy, it is necessary to undertake a thorough assessment of possible risks linked to foreign ownerships and operational control and to the use of equipment from high-risk suppliers.
- Apply the guiding principles set out in this strategy also to their own initiatives and enhance general coordination and information exchange.
- Ensure that port concessions and land lease contracts allow for sufficient flexibility to adapt port service activities to changing operational needs and strategic priorities of port development.
- Give high priority to improving the availability and capacity of hinterland connections by rail and inland waterways.

Pillar II – NEW ENERGIES, ENVIRONMENTAL SUSTAINABILITY & REINDUSTRIALISATION

The Commission will:

- In 2026, continue to monitor OPS deployment and in the upcoming Electrification Action Plan, support port electrification and promote increased transparency of OPS pricing.
 - In the upcoming Energy Union Package ensure adequate availability of sustainable maritime fuels in ports.
 - By the end of 2026, support the mapping of existing and planned infrastructure for the supply of renewable and low-carbon fuels in and around ports through the RLCF Alliance.
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- As of 2026, strengthen the role of port areas as clean-energy and energy efficient industrial hubs.
- In 2026, commission a study under the Clean Hydrogen JU, to support the Commission's activities within the Global Ports Coalition
- As of 2026-2027, promote partnerships with European ports, local authorities and industrial clusters in and around port areas.
- By 2027, provide guidance to promote the development of energy communities in ports and stands ready to provide informal guidance on antitrust issues related to such cooperation.
- By 2027, organise targeted a series of workshops for ports.
- By 2027, update and consolidate, the relevant EU environmental guidance for ports.
- Consider action towards improving the harmonisation of measuring and reporting emissions in port areas
- Support R&I to improve the assessment, monitoring and mitigation of environmental impacts from port activities
- Encourage ports to become strategic hubs for circularity.

Member States are invited to:

- Support smart-grid solutions, digitalised procedures and better reservation or commitment mechanisms that optimise the use of existing grid assets.
- Strengthen synergies between TEN-T and TEN-E networks.
- Support structured cooperation between ports and local industrial clusters.
- Improve energy security and competitiveness in the ports, including new business opportunities (such as electricity network stabilisation and heat or cold supply to district heating and cooling).
- Reflect in national procedures the presumption of overriding public interest for electricity grid infrastructure, including OPS in ports.
- align national permitting systems with these accelerated rules and reduce unnecessary administrative burden
- Implement the flexibilities and provisions under the Water Framework Directive relevant for port development.
- ensure a timely implementation of new international rules addressing sea pollution from shipping in ports

Pillar III – PROTECT & SECURE PORTS

The Commission will:

- By end 2026, update existing guidance to further strengthen maritime security legislation.
- In 2026, work on an EU framework for background checks for port workers.
- By the end of 2026, address risks for port security related to corruption in the EU Anti-Corruption Strategy.
- By 2027, develop a framework for third country port assessments to fight drug trafficking
- In 2026, more uniform and effective customs controls across EU ports together with better security protocols worldwide.
- By 2027, work on raising security standards in those inland ports that are not subject to the ISPS-Code

- By 2027, work on public-private two-way information exchange between customs and maritime logistics companies and exchange of data between private actors on drug trafficking under the anti-trust instruments
- In 2027, publish a summary of best practices based on the exchanges of the European Ports Alliance Public Private Partnership to fight drug trafficking and organised crime.
- As of 2026, launch an initiative for the EU's digital sovereignty to secure data exchanges and data storage for ports and stakeholders along multimodal logistics chains
- In 2026, publish a European Climate Adaptation Plan (ECAP).
- In 2026, publish guidance to Critical Entities under the CER Directive.
- By 2027, conduct a Union-level coordinated cybersecurity risk assessment on ports' infrastructure and consider coordinated preparedness testing and/or drilling exercises at ports on cybersecurity risk scenarios.
- By 2027 update ENISA's Cyber Risk Management Guidelines for ports.
- By 2027, establish an EU-wide maritime and port cyber information sharing platform to exchange information and best practices between maritime and cyber authorities.
- In 2027, continue cooperating with IMO to advance harmonised global cybersecurity standards for the maritime sector through a non-mandatory Cyber Code

Member States are invited to:

- Reinforce the implementation of the maritime security legislation, and adopt best practices exchanged within the European Ports Alliance Public-Private Partnership to address all elements of port security.
- carry out risk assessments according to article 5 of the CER Directive to identify their critical ports and to ensure they take measures to mitigate and prevent risks.
- ensure the handling and storage of critical goods (military, energy, food, ...) and to establish implementation plans to minimise disruption to vital supply chains, in line with military mobility requirements and the EU stockpiling strategy
- Remove relevant exemptions and fully implement Directives 2016/797, 2016/798, and 2007/59 ensuring interoperability of ports within the railway system and supporting efficient hinterland connections.
- actively implement measures to achieve a 'Good Navigation Status' by 2030.

Member States and stakeholders are invited to:

- Establish adaptation plans to mitigate climate change effects and exchange best practices on (climate and water) adaptation and risk assessments.
- take the necessary measures to protect and strengthen vulnerable infrastructure and bottlenecks and should ensure that they have sufficient redundancy and capacity to absorb short and medium term disturbances in their logistic chain and provision of critical goods.

The EMS Coordinator will:

- facilitate resilience planning through workshops with other European Transport Corridor Coordinators to explore contingency options for maritime and hinterland connectivity should major ports on key transport routes be disrupted.

Pillar IV – ACCESS TO FINANCE & INVESTMENT

The Commission will:

- Apply the priorities and criteria developed in the strategy across all funding instruments.
- Propose priority actions in line with the common criteria mentioned above and suitable partnerships to support innovation in ports
- Make best use of available funding under the current MFF to support the priorities of the strategy.
- Propose priority actions and suitable partnerships in the framework of the new MFF.
- Engage with National Promotional Banks and Institutions and private financial stakeholders to identify additional financing solutions to bridge the investment gap for maritime and inland waterway ports and operators.

The EIB is invited to:

- Align with the priorities and conditions of the strategy and expand support and assistance to smaller operators, ports and SMEs in the ports sector.

Member States are invited to:

- Depending on local needs and circumstances, include investment in transport infrastructure, incl. ports and their multimodal connectivity, as a priority in their National and Regional Partnership Plans (NRPPs).

Industry stakeholders are invited to:

- Pursue forward-thinking, out-of-the box strategies, integrating cutting-edge technologies and innovative sustainable practices to, create new revenue streams, remain competitive and resilient in future market conditions and enhance attractiveness to investors.

Pillar VI – SOCIAL COHESION, SKILLS & QUALITY JOBS

The Commission will:

- Continue to support territorial cohesion and the connectivity of islands and Outermost Regions.
- In 2026, include policy measures to strengthen the economic, environmental and social contributions of ports to local communities in the upcoming Island and Coastal Communities Strategies.
- As of 2026, strengthen dialogues and support the development of best practices and guidance on enhancing port-city relations.
- In 2027, develop a skilled next-generation workforce across all blue economy sectors, including ports.

EMSA will:

- By 2027, develop guidance on the application of maritime safety legislation to port workers on board ships.
- By 2027, prepare guidance on the safe handling of alternative fuels.

Member States are invited to:

- Increase their support to infrastructure, safety and sustainability improvement projects for ports in islands and outermost regions.
- Ensure implementation and respect of Union and national labour legislation and collective bargaining agreements.

Social partners and other sector stakeholders are invited to:

- Establish a skills partnership to support the upskilling and reskilling and inclusion of workers in the ports sector.
- Submit pledges under the Cybersecurity Skills Academy and raise awareness on the European Cybersecurity Skills Framework (ECSF) tool for port professionals.
- Ensure safe working conditions and implement the EU-funded project for a European safe network in ports, aimed at developing safety training modules.

Agence Europe